

APPENDIX D

A. Project Title and Project Purpose Statement

The SouthCoast Energy Challenge, a program of SEEAL – Southeastern Environmental Education Alliance, a flagship fund of the Community Foundation of Southeastern Massachusetts was launched in 2011 to build community capacity to reduce energy usage in the south coast region by 15% in five years. **The Energy Efficiency Access – Fall River Initiative** (Fall River Initiative), if funded under this grant, would empower Fall River's most underserved and most under-represented residents to improve energy efficiency and air quality in their immediate living environments. This initiative will close the current gap in energy efficiency access for renters and rental property owners by providing an environment in which open education and open dialogue leads to actions result in improved health, increased community participation and economic sustainability.

The primary purpose of this grant is to conduct climate and energy education to improve access to no-cost home energy assessments for residents in designated environmental justice communities in the City of Fall River and to facilitate dialogue between renters and landlords in order to improve energy efficiency access and building energy efficiency.

The Fall River Initiative will help residents garner the economic benefits of reduced energy consumption, and help mitigate the most severe public health threats posed by carbon dioxide emissions. Through direct outreach efforts, residents will be empowered to take concrete energy saving actions such as completing home energy audits and installing simple energy efficiency technologies or by implementing energy efficiency behavior changes. These actions will reduce carbon dioxide emissions which will improve pulmonary and respiratory illnesses and conditions. Property owners will be presented with the economic and environmental benefits of home energy performance improvements and increased energy efficiency. As property owners complete home energy assessments and weatherization retrofits, their tenants will experience increased comfort, improved health and greater control over how rising energy costs and weather changes impact their lives.

The initiative and program activities will focus on 10 neighborhoods located in Fall River, Massachusetts, located within the following zip codes: 02720, 02721, 02723, 02724 and 02790.

The Energy Efficiency Access – Fall River Initiative includes community outreach and solution-based actions that are affective in prevention and control of known causes of air pollution under related EPA Qualified Environmental Statute 103 (b) (3) – The Clean Air Act. Asthma rates in the City of Fall River are consistently the highest in the state of Massachusetts (29.3/10,000) due in large part to the city's proximity to the state's largest single emitter of carbon dioxide pollution in the state – Brayton Point Power Plant. These factors contribute to Fall River's status as an environmental justice community in Massachusetts.

Community climate resiliency will be addressed using two strategies. Our initiative will work to increase the adaptive capacity of the focus communities by forging new connections between affected residents, neighborhood associations and local, social service organizations who are connected to larger networks that provide basic energy services to Fall River communities, and

second, our initiative will reduce resident's vulnerability to temperature extremes by empowering residents to improve living conditions through better home efficiency, health and air quality checks and improved home energy equipment function.

B. Environmental, Public Health and Community Climate Resiliency information about the Affected Community

The City of Fall River, located in Bristol County, is the tenth largest city in the State of Massachusetts. For over 200 years Fall River was known for its textile industry and cotton mills. The City rode a wave of prosperity well into the 20th century and left a legacy of immigrants who worked in the mills, formed communities and joined various parishes representing all faiths. Fall River boasts the highest rate of church affiliation of any city in Massachusetts (60%). Religious feasts, events, and parishes anchor most neighborhoods and serve residents by providing social services as well as immigrant assistance, language translation and health services.

The City of Fall River and its residents have lived in the shadow of the largest emitter of carbon dioxide pollution in Massachusetts for over 4 decades. Brayton Point Power plant ranks 14th worst of 378 coal powered power plants nationwide and earned a rank of "F" for environmental justice from the NAACP in 2012. Proximity to this power plant has increased Fall River resident's exposure to air-borne pollutants which over time have caused or exacerbated respiratory conditions and pulmonary illnesses such as asthma in adults and children living in the City. Asthma rates for Fall River adults over 18 years of age are the highest in the State, ranging from 10.0 – 12.9 %.(MADeptPubHealth)

The City of Fall River is one of two gateway communities along the south coast of Massachusetts and over 18,000 of its 88,945 residents are foreign-born. A high unemployment rate (12.6%) and large number of residents who live below the poverty line (>25%), in addition to a high number of renters (>60%), make Fall River residents particularly vulnerable to the effects of climate change. Renters are much less likely to have access to energy efficiency programs despite contributing to the Mass Save program on their utility bills. Property owners who do not contribute toward tenants' utility costs are not incentivized to improve the efficiency of the properties. This inequity has been recognized by the Massachusetts Department of Energy, RISE Engineering, the energy service company contracted to perform energy assessments in the City of Fall River and by the Barr Foundation in its Climate Theory of Change.

Two climate and energy focused programs have been launched in Fall River over the past two years. The Fall River Neighborhood Energy Contest worked to reward neighborhoods that were responsible for signing up residents for energy efficiency audits over a 6 month period from 1/1/2013 – 7/1/2013. The program was a partnership between the City of Fall River, Liberty Utilities and Honeywell, Liberty Utilities' certified home energy service provider. A total of 199 home energy assessments were performed within 14 neighborhoods throughout the City. The Fall River Neighborhood Energy Contest was a broad effort to reduce energy usage among residents and the highest participation rates were in two of the highest income neighborhoods. Strong local

leadership and a high rate of home ownership contributed to the success of this program model in the winning neighborhood.

In 2013, SEEAL – the Southeastern Environmental Education Alliance, was awarded a Healthy Communities Grant (SouthCoast Energy Challenge – Dynamismo Initiative) to bring climate and energy education to non-English speaking residents of Fall River and New Bedford. Over the course of 12 months, 1,887 hours of outreach were performed and 1,421 non-English speaking residents were registered for the program. Outreach staff conducted 8 community leader meetings with local immigrant and community service organizations, including Fall River Partners for a Healthier Community, Fall River WIC, Health First Family Care Center, Catholic Social Services, and Fall River Public Schools. These partnerships established a mutual agreement on the importance of environmental stewardship and education to strengthen non-English speaker ability to access state and local energy programs. Two half-day workshops were held in Spanish and Portuguese to demonstrate sustainable practices and to explain financial incentives and access to state programs. Translated materials, available in Spanish and Portuguese, were distributed to 9 sites within target communities in the City. The overall impact of the Dynamismo Initiative was to build trust among non-English speaking populations in Fall River and to build capacity among local organizations who serve non-English speaking residents.

The affected communities that the Fall River Energy Efficiency Access Initiative will focus on are located in ten different neighborhoods, all represented by established Neighborhood Associations within the Fall River Neighborhood Association Network. The affected communities meet environmental justice classification criteria as having 28% of residents below poverty level. Other factors which contribute to the overall conditions of the affected residents include: median household incomes are less than half of the MA average, homeownership, at 37% is almost half of the state average (61%), 83% of the residents who rent and have incomes below the poverty level reside in the affected neighborhoods unemployment rates -10.50%, are well above MA average, ranking 3rd in the State.

The communities that are the focus of the Fall River Initiative are and will continue to be disproportionately affected by high pollution and Carbon Dioxide levels resulting from their proximity to the Brayton Point coal-fired power plant. The affected communities will be more vulnerable to health impacts and economic impacts of climate change due to higher and lower than normal temperature fluctuations. These residents have less environmental education and less access to energy efficiency program benefits that are designed to provide financial and material resources which can help mitigate the effects of extreme weather events on personal health and budget. A low homeownership rate coupled with a low community participation rate makes these Fall River communities vulnerable and less able to prepare for extreme weather and the economic effects of rising energy costs in general.

In the area of building energy efficiency, the Fall River Initiative addresses the critical question of who has access to resources to weatherize and make energy efficiency upgrades to their homes, and who benefits from the increase in economic activity related to energy efficiency.

The 10 target communities will benefit from the Fall River Initiative in several ways:

- Residents will receive education and access to energy efficiency program information and environmental health impact information through informative literature created specifically for this population, community workshops, presentation and partnered events. This access will enable vulnerable residents to receive no-cost home energy efficiency audits, free air sealing, free energy saving products and a health and air-quality check of their residence.
- Residents will be provided with knowledge that their property owner or manager is in agreement that a home energy assessment for renters is permitted, acceptable and will not negatively impact the renter's relationship with their property owner.
- Landlords and property owners will receive targeted outreach materials, an energy efficiency toolkit, building energy weatherization tours and technical presentations on energy efficiency upgrades and financing. This initiative will sign up landlords to schedule energy efficiency assessments and make building energy envelope improvements that positively impact property owner's operating costs and improve tenant's energy costs and living conditions.

C. Organization's Historical Connection to Affected Community

The Southeastern Environmental Education Alliance and its member organizations have been involved in environmental education, youth job creation, land conservation, and environmental justice work in the City of Fall River for over 20 years.

Over 20 years ago, the Lloyd Center for the Environment began working in public schools in Fall River to educate grade school-age children about biodiversity, wetlands and coastal habitat protection. In 2006, the Lloyd Center implemented the Science Curriculum Reform and Development Initiative in 47 third and fifth grade classes. The Lloyd Center's Coastal Exploration Program is now taught in all 39 fifth grade classes in Fall River public schools.

One of the founding members of SEEAL, the Trustees of Reservations (TTOR), owns and manages the SEMA Bioreserve (Copicut Woods), located on 516 acres in the north end of Fall River. The Bioreserve Youth Corps was created in 2003, and they learn the value of teamwork and community pride while working on biodiversity and land conservation projects at the Bioreserve and the City of Fall River Tree Planting program. TTOR maintains a calendar of events and offers local residents guided walks in the Bioreserve where they can educate children and their families about the importance of biodiversity and the preservation of open spaces and local wildlife.

Since 2011, the SouthCoast Energy Challenge has signed up over 1,000 Fall River residents for home energy audits, solar assessments, or other energy saving actions. The SouthCoast Energy Challenge is 20% towards their goal of reaching 5,000 Fall River members by the end of 2016. To register members, the Energy Challenge performed outreach at local events such as the Fall River

farmer's market, Diman Middle School community events, BCC Green Center commuter events, and Partners for a Healthier Community neighborhood events.

From 2013 – 2014, the SouthCoast Energy Challenge, working under an EPA Healthy Communities Grant launched the Dynamismo Initiative(EPA-R1-HC-2011), an energy education and community access building initiative for non-English speaking residents in Fall River and New Bedford. Staff performed over 1800 hours of outreach and registered 1,421 residents with interest in the program. Staff conducted eight meetings with organizational leaders, including Fall River WIC, Health 1st Family Care Center, Catholic Social Services, and Fall River Public Schools. These partnerships established a mutual agreement on the importance of environmental stewardship and environmental education. The Initiative provided a unique service to an underserved community by distributing climate and energy information in Spanish and Portuguese and by presenting workshops to this community in their native languages. The grant period ended as of 12/31/14; but new projects that serve the Fall River Community are being planned.

D. Project Description

1. Program Deliverables and Results

- Reach 2,000 households (renters or owners) in 10 neighborhoods in Fall River identified as meeting Environmental Justice criteria with energy efficiency awareness and air quality information. This includes distribution of at least 400 easy to understand energy efficiency toolkits, facilitation of 4 professionally developed workshops, 20 community partner presentations and on-site demonstrations about climate change and the environmental and health impacts of fossil fuel use.
- Register at least 25 property owners (landlords) for building energy assessments (of their rental property) and further weatherization work, including but not limited to: insulation, window replacement, air sealing, and equipment replacement
- Register 300 renters for no-cost home energy assessments which include LED lighting upgrades, air sealing, water saving faucet attachments, programmable thermostats and air quality checks.
- Empower renters and property owners by facilitating dialogue around shared economic and environmental impacts of energy efficiency at community workshops and through neighborhood association meetings.
- Reduce annual carbon dioxide emissions from Fall River renters and property owners' households by 200 metric tons through energy efficiency audits and sustainable behavior change.

The long-term benefits of the Fall River Initiative include a reduction of carbon dioxide emissions from building energy use, improvement of air quality and a functional community network which provides support and climate change adaptation capacity for tenants and property owners.

2. Program Components: Four strategies will be employed to carry out the Fall River Initiative:

- Neighborhood Education and Outreach – Meet with representatives of each of the 10 targeted Neighborhood Associations (Father Kelly, Corky Row, Steep Brook, St. Annes, Below the Hill, Niagara, North End, Bank St., Merchants and Flint). Recruit volunteers to help coordinate presentations at regularly scheduled meetings with residents, to distribute literature and to coordinate local workshops. Establish canvassing protocol, specific needs of residents (translation, access issues, etc.) and coordinate communication strategy through Association social media pages, local newsletters, public access TV.
Distribute literature through community tabling events, church and community group presentations and literature drop-off sites. Register participants through door-to-door canvassing, attendance at meetings, community partner tabling and neighbor-to-neighbor referral.
- Demonstration and Presentation – Program staff will coordinate multiple opportunities for residents to access program information through attendance at local workshops. Workshops will include visual presentations, Q&A with energy efficiency, public health and financial experts and distribution of Energy Efficiency Tool-kit materials. Workshops will include on-site opportunity to register for home energy assessments.
- Media Campaign, Communication – The affected communities will be made aware of the Fall River Initiative, associated events, workshops and presentations through local print media (Herald News, El Latino Expresso) press releases, the City of Fall River website(neighborhood pages), MyFallRiver.org, individual Neighborhood Association FaceBook pages and the SouthCoast Energy Challenge website. Program posters will be distributed in each neighborhood and at community partner locations. Community organizations with newsletters, community boards or social media pages will post events and program notices.
- Tracking and Reporting Progress – We track community engagement goals and the resulting reductions in energy consumption and carbon dioxide emissions by using a variety of methods including: the SouthCoast Energy Challenge web portal database – designed to store registration information in a format that is easily sortable, documentation and follow-through of home energy audit canvassing, registrations and weatherization projects performed under the Fall River Initiative, and via completion of participant worksheets and workshop sign-up forms.
Home Energy Performance contractors, RISE Engineering and Next Step Living will provide monthly progress reports containing quantitative data including home energy assessments scheduled, performed and weatherization projects and the associated energy savings.

3. Project Timeline:

July 1, 2015: Procure local Fall River office, review bids and hire graphic designer, schedule partner meetings for technical and health impact information for outreach materials

July 15, 2015: Develop multi-lingual outreach collateral, approve final designs, print materials

August 1, 2015: Create web pages for SEC website, secure 2 venues for workshops

August 15, 2015: Create training manual for outreach staff, set weekly goals

August 15, 2015 – June 30, 2016: Perform coordinated community outreach to renters and rental property owners through canvassing, community partner presentation, press events, media

September 15, 2015: Develop multi-lingual presentation and visuals, schedule technical experts, coordinate media to insure attendance

October, 2015, January, 2016, March, 2016, May, 2016: Conduct public workshops for rental property owners, facilitate Weatherization Lab tour, facilitate property owner registrations

July 1, 2016: Finalize program components, analyze activity, produce and distribute results to partners, EPA, SEEAL Board and City of Fall River staff.

4. Community Impact:

We will address the EPA Target Program Area: Capacity-building on Environment and Public Health Issues, by providing quality energy awareness and energy efficiency outreach, education, and training. Our work will reach at least 2,000 separate households with educational information, with a goal to register at least 300 of these households for home energy assessments through the Fall River Initiative. Community engagement activities will include door-to-door and site-based organizing, community workshops, and events to build awareness and train our target populations on the skills needed to become more thoughtful energy consumers.

5. Community Capacity Building

The Fall River Initiative addresses a need for increased awareness, education and outreach around energy efficiency access for renters and rental property owners that is currently not being met or addressed by any local community initiative or provision within the State's Department of Public Utilities 2013-2015 3 Year Electric and Gas Energy Efficiency Plan.

An aggressive community campaign, involving multiple stakeholders will build momentum within each community, setting precedent for the formation of a City of Fall River Energy plan that includes all sectors of the community in new energy programs in the future. As the City incorporates climate resiliency planning into each department's objectives, more residents will have a place at the table.

Training rental property owners to identify and address energy efficiency and indoor air quality issues and providing them with resources to address those issues will improve property values. A more competitive rental market will encourage non-complying property owners to adopt similar efficiency standards, improving living standards on a broad scale.

6. Energy Efficiency Access and the Clean Air Act

The Fall River Initiative will conduct public education to demonstrate the connection between air pollution from increased home energy use (from fossil-fuel sources) and health impacts. Education in the form of direct outreach, public demonstrations, community meetings and distribution of technical and health impact fact sheets will inform affected residents who are at the highest risk for lung and pulmonary illnesses. Public education information will include strategies and action steps for rental property owners to improve indoor air quality for tenants by making energy efficiency improvements to rental properties.

The Fall River Initiative is linked to the EPA's Strategic Plan – FY 2014-2018; Strategic Goal: Address Climate Change and Improve Air Quality and Cross Program Strategy: Working Toward a Sustainable Future by providing new community energy program tools that promote actions that will result in the reduction of indoor environmental asthma triggers. HEAs for tenants and rental

properties improve building insulation and address moisture issues, which when addressed, limit exposure to indoor allergens, including mold.

The Fall River Initiative will create a conduit for new dialogue within communities on environmentalism by engaging property owners and empowering renters using multiple forms for outreach including meetings, door to door canvassing and energy demonstration-lab tours. New collaborations will be forged between rental property owners and community groups to support future actions taken to mitigate climate change

7. Partner Investment and Involvement

- United Neighbors of Fall River will provide the Fall River Initiative access to bi-monthly meetings of its' member organizations – an opportunity to present to over 25 community health and social service organizations. Coalition members will access to event tabling throughout the year and opportunities for community presentations. The Neighborhood Association Leadership Roundtable, a coalition member is responsible for leading meetings and events for 16 Neighborhood Associations. The Fall River Initiative will work with roundtable representatives in ten target neighborhood associations to coordinate presentations to residents, distribute educational materials to meeting attendees and to coordinate multi-neighborhood events. The coalition's on-line resource guide, MyFallRiver.org, will display our event announcements. The United Neighbors Coalition members support the Fall River Initiative because our outcomes will improve the long-term economic stability and health of their clients.
- RISE Engineering, a certified home energy performance contractor works with Liberty Utilities, the predominant gas utility for 70% of Fall River residents. RISE will support the Fall River Initiative by:
 - Providing technical assistance for outreach, related to energy efficiency rebates, incentives and procedures, home energy assessment and the no-interest HEAT loan program.
 - Contact all participants who sign up with interest in a home energy assessment (HEA) to schedule assessments for all residents who qualify.
 - Perform no-cost HEAs and provide the resident with a home energy report upon completion.
 - RISE will present rental property owners with quotes for weatherization work, including Mass Save program rebates and incentives. RISE will perform the work upon the residents' request.
 - RISE will provide monthly reports, including information pertaining to project stage, HEA scheduled, HEA completed and weatherization work performed. Carbon savings and GHG avoidance information will also be calculated and included in reports.
 - RISE has identified a need to improve access to energy efficiency assessments for renters and rental property owners and is committed to supporting our efforts in Fall River.
- Next Step Living(NSL), a certified home energy performance contractor works working with National Grid in Fall River, the energy utility servicing 30% of Fall River residents. Next Step Living will serve the same function as RISE Engineering and will support the Fall River Initiative, specifically assisting residents who have NGrid as their utility provider. (See RISE Engineering partner responsibilities above).

Next Step Living has been working as a business partner for 4 years and has well established community affiliate support program. NSL and will continue to provide assistance to Fall River residents beyond 2016.

- Bay Coast Bank: Bay Coast Bank will assist the Fall River Initiative by providing financial information about financing energy efficiency programs at community presentations and workshops. Bay Coast Bank is a certified Mass Save HEAT loan provider and will work with all qualifying residents to finance state approved Mass Save weatherization projects. Bay Coast Bank provides an easy to use on-line HEAT loan registration portal and a full-service phone registration system for residents who need translation or do not have access to a computer. Bay Coast Bank is heavily invested in Fall River and will provide excellent customer service and strong community support from its' 6 Fall River bank locations.

E. Organizational Capacity and Programmatic Capability

Financial Management: The SouthCoast Energy Challenge is a project of the Community Foundation of Southeastern Massachusetts and all financial management is performed by the Foundation. The Community Foundation maintains a full-time financial officer, a part-time book-keeper and an outside accounting firm. Financial reports are reviewed by the Board of Directors and an outside investment firm. The Community Foundation has a certified financial audit each year, performed by a third-party investment firm.

The Community a two-year, \$236,000 “Sustainable New Bedford” grant made to SEEAL and the City of New Bedford by the EPA in 2008(EPA Assistance ID #: X8-97182501-0). Through this project, small grants were awarded to 43 different organizations for 30 sustainability-related collaborative educational opportunities. Most recently, the Community Foundation administered a one-year, \$25,000 EPA Healthy Communities Grant (EPA-R1_HC-2011), for SEEAL and the SouthCoast Energy Challenge.

CFSEMA supports SEEAL and the SouthCoast Energy Challenge with backroom operations including financial bookkeeping and accounting, annual financial audits, and quarterly financial reports. CFSEMA also contributes such operational overhead as office space, telephone/fax, copy, and computer equipment. This relationship maximizes our program’s ability to focus directly on achieving our environmental program goals.

Grant Management: SEEAL and the SouthCoast Energy Challenge Director, and Fall River Initiative Project Manager Karen Stewart, successfully managed the Healthy Communities Grant – Dynamismo Initiative (2013-2014, EPA-R1_HC-2011, Jennifer Padula, Grant Manager). Ms. Stewart hired a bi-lingual Outreach Coordinator and managed two outreach staff and several student outreach interns hired and managed 4-10 outreach staff throughout the year who performed over 1800 hours of public education and outreach in Fall River and New Bedford. Ms. Stewart tracked outreach activity, partner event coordination, held weekly project staff meetings, and submitted all progress reports by the required deadline.

Ms. Stewart would use her experience to effectively execute the Fall River Initiative and all aspects of outreach recruitment, community partner communication, reporting requirements and program analysis.

F. Qualifications of Project Manager:

Karen Stewart, Director of the SouthCoast Energy Challenge has supervised all staff, operations, planning and strategic development since 2013. Over the past two years, Ms. Stewart has presented to the United Neighbors of Fall River alliance several times and has maintained partnerships with church groups, environmental organizations (Toxics Action Center, Coalition for Social Justice) and several businesses for the purpose of performing community outreach activities for the SouthCoast Energy Challenge program. Ms. Stewart is also responsible for hosting preliminary meetings with the Mayor's office to discuss the creation of a Sustainability Plan for the City of Fall River.

As Project Manager of the Fall River Initiative, Ms. Stewart will oversee all operations, including hiring staff, community partner development and communications. Ms. Stewart will be responsible for providing updates and reports to Neighborhood Associations and energy service providers and will maintain the master participant database to insure accuracy, confidentiality and quality of collected information.

Ms. Stewart will be responsible for creating training materials for new staff and will oversee the creation of all educational outreach materials, graphic design and press releases.

Ms. Stewart will maintain an open channel of communication with City of Fall River staff and City officials and will work to include community members in decision making opportunities with the City and program partners.

G. Past Performance Reporting on Outputs and Outcomes:

After an agency-approved program extension, Karen Stewart acted as Project Manager for the final year of the Dynamismo Initiative, an EPA, 1 year, Healthy Communities grant in the amount of \$25,000 (EPA-R1_HC-2011, Jennifer Padula, EPA Grant Project Manager), supervising all program activities and overseeing all reporting activities.

The project work plan was monitored and adjustments made as necessary to achieve the program goals. Project milestones were achieved in 4 of the program objectives, falling short of goal in outreach totals due to the non-participation of two strategic partners - UMass Dartmouth Office of Sustainability (due to lack of University funding) and BCC student canvassing volunteers (lack of interest). All progress reports were submitted in full and on time: Reports #1:11/19/12, #2: 3/13/13, Report #3: 8/15/13, #4: 3/24/14, #6: 5/14/14, #7: 8/13/14, #8: 11/19/14. The Final Grant report due: 1/31/15. #8 reflects the lack of partner support and missed goals for canvassing outreach and the final report will reflect any adjustments made to strategy, program model or partner involvement. Internal reports, presentations to the Community Foundation and SEEAL Board of Directors and municipal leaders were performed by the Project Manager in cooperation with the outreach team, using our program database, energy performance contractor reports and community partner feedback.

H. Quality Assurance of Project Performance: The SouthCoast Energy Challenge will not require the use of existing environmental data or collection of new data to achieve stated grant outcomes.

